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HISD's Decentralization Reform (Part 1: Policy Analysis)

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RESEARCH BRIEF ABSTRACT

HISD's Decentralization Reform (Part I: Policy Analysis)

This research brief is Part I of a four-part series that studies the implementation and impact of the HISD decision to decentralize in the 1990s.

- Part I describes how decentralization was enacted in HISD.
- Part II describes input from HISD principals and their sense of self-efficacy and capacity under the current decentralized model.
- Part III examines the impact of decentralization on student outcomes.
- Part IV examines the impact of decentralization on funding equity.

Findings from Part I

In this first brief, we examine the implementation of decentralization at HISD. The process that HISD originally undertook was well documented and fairly well structured. Over time, many of the key components of a strong decentralization model were addressed. For example, decision-making was shifted to the campus level. Funding was re-structured to provide the principals more flexibility and to re-distribute monies to schools based on a base amount plus weights for student level characteristics. Key changes were phased in, and attention was given to minimizing negative impacts as campuses adjusted to funding redistribution. However, some components of decentralization have been only partially fulfilled. For instance, in the literature, school choice is important under this model because it fosters competition and innovation as campuses strive to protect their funding by doing the best job they can for students. HISD is an open choice school district in theory; yet in practice, most campuses are using transfer agreements and choice is somewhat constricted. Additionally, research emphasizes the need to review and update the weighting structure frequently; while the weights have been adjusted, there is an opportunity to revisit these based on Houston's specific demographics. Finally, there are key elements of decentralization that were not implemented. The shift from average to actual teacher salaries was never made, and Small School Subsidies and magnet programs serve to distort the impact of funding redistribution. These findings suggest that there are modifications that could improve the existing model.

Introduction

In the late 1980s, the Houston Independent School District (HISD) was a highly centralized bureaucracy like many other urban school districts. Drop-out rates were starting to increase, student outcomes on average were low (e.g. 46 percent of 8th graders met or exceeded the minimum expectations on TAAS in 1999), and there were “perceived inequities” in funding (Haines, 1999, p.3). The HISD School Board adopted a decentralization plan to improve student achievement and increase equity in funding; both the board and the administration believed that this could be accomplished by shifting more decision-making to the local level (campus). This reform included a shift from a full-time equivalency funding model (FTE) to a weighted student funding model (WSF).

This brief provides the necessary context for a thoughtful discussion about HISD’s current decentralized model; it is one part of a broader study that addresses four key topics related to the decentralization of HISD. Two of these questions address how the program was enacted, examining the policy and practice of decentralization; two of these questions will examine the impact of decentralization on student outcomes and funding equity. Here, we emphasize the implementation of the policy; specifically, we compare the specific components of a decentralization model to HISD’s adoption to identify strengths and weaknesses in the implementation.

Research Question

The research questions for this brief are:

- What are the key components of decentralization?
- How does HISD’s implementation compare to best practice from a theoretical perspective?
- Are there other policies in place that interact with the goals of decentralization?

Useful terms

Equity

There are multiple ways to conceptualize equity, one of the two main goals of the reform. Horizontal equity requires that equally situated groups are funded equally; in other words, it assumes that there is the same base amount of general education funding provided for all students. Vertical equity anticipates that unequal groups require different amounts of resources to achieve the same outcomes; vertical equity accounts for student characteristics that have been found to require additional funding. The goals articulated by the PEER Committee on Decentralization tasked with planning the decentralization process reflected an emphasis on vertical equity. There is consensus in the field that given finite resources, vertical equity is a logical priority; vertical equity exists when specific characteristics that merit additional funding, such as poverty or ELL, are positively and significantly associated with funding.

FTE

An FTE funding model is a staff-based allocation model that treats each school as a similar unit that varies only by enrollment level. An FTE model applies student-teacher ratios to projected enrollment levels to allocate campus funds. Other campus level costs are budgeted through central administration, which tends to ensure more consistency in non-instructional positions such as school nurses.

WSF

WSF allocates campus level funds based on school level enrollment (elementary, middle or high school) and average daily attendance, incorporating additional funding for student characteristics such as Bilingual/ELL, migrant, or Gifted/Talented. HISD calls the base amount a Per Unit Allocation (PUA) and adds weights, or increments, which are allocated based on individual student characteristics. Costs such as teacher aides and non-instructional positions are covered through this allocation, which allows for more innovation in staffing decisions.

What do we know about decentralization?

The decentralization reform movement originated from organizational theory/business management; site specific management is seen as the remedy to the high overhead costs and highly specialized positions associated with a large bureaucratic organization. In the context of school districts, proponents argue that the principal is in the best position both to identify their students' needs and decide how to meet those needs. School principals therefore need autonomy to develop the appropriate staffing plan, determine class schedules, and prescribe teaching methods. In a decentralized model, principal capacity is essential, as is an accountability system to exercise oversight and support. School-level control of the budget using a model such as WSF is described as a key component of a decentralization reform, because asking principals to make innovative staffing decisions without the ability to pay for them can be fruitless.

Today, WSF (or a similar model, such as Fair Student Funding) is still in use in several larger cities, such as Boston, and New York; other cities, like Seattle, have moved away from this model (see Figure 1). Seattle now uses a modified form of an FTE model called Weighted Staffing Standard;

Seattle's notable modification to the traditional FTE model is that the district applies different staffing ratios to schools with high poverty levels than those with non-high poverty levels.

WSF is not just a local funding model; it is the most commonly used mechanism to distribute special funding at the state level. The federal Every Student Succeeds Act (ESSA) also advocates for weighted per pupil allocations. In an ESSA pilot program, districts that commit to a

more equitable distribution based on actual per-pupil expenditures will be afforded more flexibility in how they allocate Title I and other federal funds. (In this case, however, the funds are not to follow the student, which is a key feature of WSF in general.)

However, there are researchers who criticize the lack of quantitative studies that validate the theory behind decentralization. Others suggest decentralization suffers from a lack of precision in definition and clarity in design. Critics of WSF specifically argue with justification that it has the propensity to incentivize large schools and penalize small ones.

Baltimore, MD
Clark County, NV
Douglas, CO
Poudre, CO
Boston, MA
Cleveland, OH
Indianapolis, IN
Norwalk, CT
Chicago, IL
Denver, CO
Hartford, CT
Jefferson County, CO
New York City, NY
San Francisco, CA

Figure 1: Partial list of urban districts using a version of WSF

Source: <https://www.erstrategies.org/> and email communication from K. Miles, 2017.

The decentralization of HISD

Early adoption steps

HISD actually began its decentralization process in the 1990s. Early steps in this process included:

- Creation of Shared Decision-Making Committees (SDMCs) at the campus level;
- Development of the Resource Allocation Handbook (RAH), intended to improve equity in funding and flexibility in spending;
- Creation of Peer Examination, Evaluation and Redesign (PEER) Program to review operations and suggest improvements; and
- Establishment of Peer Committee on Decentralization in 1998.

The Peer Committee on Decentralization was tasked with ensuring that educational decisions were being made at the level that best supported the relationship between the teacher and the student. The mission statement of the committee included:

- Develop a fair, equitable, and effective decentralized approach to resource allocation;
- Recommend areas of management and operations which can be handled most effectively at the campus level; and
- Design a financial/management system to replace the current system for funding schools.

According to the 1999 Peer Committee on Decentralization, stronger academic success for HISD students and increased equity in funding were both guiding principles of their recommendations. Although there are debates in the scholarly literature about the relationship between spending and achievement, recent research does support the position that vertical equity can minimize the effect of student characteristics on achievement. Additionally, com-

mon sense does suggest that equity in funding is a worthy goal in and of itself. The companion briefs on the impacts of this reform will allow us to better understand the extent to which these two goals were or were not achieved.

The transition to WSF that was spelled out by the Peer Committee report represented the final and key step in the decade-long shift to a decentralized model of school finance and governance for HISD; WSF was phased in over two years from 1999-2001.

Key changes that were made in HISD policy based on decentralization

- WSF model (campus based budgeting using weights for student characteristics)
- Principal control over staffing/hiring/instructional decisions

Decentralization is referenced at least five times in the Houston ISD Board Policy Manual; three of these references provide broad guidance and a rationale for the current policies that is well rooted in the scholarly literature around decentralization. These policies make explicit HISD's commitment to facilitating a decentralized system of campuses wherein instructional decisions concerning students are made by the principals of those students. For example, the current HISD Educational Philosophy statement (LDU 2013.01) explicitly expresses the support of a decentralized school district that provides principals with autonomy; this commitment is reinforced by the HISD Legal Policy (LDU 2011.06) regarding the annual budget which states that "Schools are where the decisions should be made; accordingly, principals must be the leaders of that decision-making process."

HISD's policy places strong emphasis on the role of the principals, which is in line with theory. Administrative Regulations (LDU 2010.02) provide specific examples

of how this should be done. These include mention of the principal-led shared decision-making committees (SDMC) at each school which ensure input from the faculty, staff, and community, management of the budgeting process for their student population, and principal control over school staffing and hiring.

HISD funding today

School finance is a highly technical topic and generally beyond the scope of this brief.

However, it is helpful to know that the Texas Education Agency (TEA) essentially establishes a basic allotment per student then adjusts that amount based on several district specific features, such as cost of education in the region or the sparsity of population. The TEA also uses weights to deliver additional funding for students with specific characteristics. The TEA categories for special education funds are more detailed than the HISD weights and difficult to compare; however, the three HISD weights seen in Table 1 in bold are equivalent to the TEA weights for those specific categories.

At the local level, HISD determines its own PUA (see Table 2) and applies its own weights as seen in Table 1. To illustrate this in a simplistic way, in 2017, the base amount for a middle school student is \$3,558; if a student is also ELL, this amount is increased to \$3,914 (base amount * 1+weight). The base amount for an elementary school student is \$3,522; if that student is ELL, the amount is increased to \$3,874. These amounts are the same at the high school level; however, high schools benefit from the High School State Allotment (a TEA add on) which contributes an

Table 2. HISD PUA funding levels 2003-2017

Year	Per Unit Allocation		
	Elementary	Middle	High
2003–2004	\$2,732		
2004–2005	\$2,802		
2005–2006	\$2,768		
2006–2007	\$2,832	\$2,842	\$2,871
2007–2008	\$3,071	\$3,096	\$3,085
2008–2009	\$3,257	\$3,282	\$3,246
2009–2010	\$3,368	\$3,393	\$3,357
2010–2011	\$3,485	\$3,510	\$3,474
2011–2012	\$3,257	\$3,282	\$3,246
2012–2013	\$3,341	\$3,366	\$3,330
2013–2014	\$3,378	\$3,403	\$3,367
2014–2015	\$3,470	\$3,495	\$3,459
2015–2016	\$3,589	\$3,625	\$3,589
2016–2017	\$3,522	\$3,558	\$3,522

additional \$163 per student¹. Therefore, an ELL HISD high school student would actually garner a campus \$4,037.

At the district level, 66% of the campus budget is managed at the campus level, while the remainder is still centrally managed, addressing a range of operating costs.

HISD in the literature

HISD's shift to a decentralized model was analyzed by researchers in its early years. Miles and Roza (2006) observed that in 2002-2003, HISD's lowest funded school prior to decentralization had increased from 46% to 96% of the district-weighted average allocation; other findings suggest modest increases in equitable allocation overall. Other researchers (Cooper et al., 2006) estimated that 31.2 % of HISD funds were redistributed under WSF; the ratio of the highest possible allocation for one student to the lowest possible allocation for one student was 7.5 (which essentially means that a student who fits every weighted category is allocated 7.5 times the amount of a baseline student.) Baker & Elmer (2009), however, found the relationship between spending and free and reduced lunch or at-risk designations was positive but modest at the school level in HISD.

So what should decentralization look like?

Table 3 provides the basic framework for a successful decentralization plan as presented in the scholarly literature.

¹ The actual funding amount is \$275 for each student in average daily attendance; a portion of these funds are applied to district-wide initiatives.

Table 1. HISD 2016-2017 Weights

Category	Weights
SCE	0.15
Special Education	0.15
G/T	0.12
CTE	0.35
ELL	0.10
Homeless	0.05
Refugee	0.05

Table 3. Elements of a Decentralization Reform and the HISD Implementation

Element	Rationale	HISD Reality	Conclusion
Campus based budgeting.	Odden & Busch suggest that 75% of the potential school budget be managed by principals rather than central administration. Principals need control over resources to effectively make staffing and scheduling decisions.	Original goal set by PEER Committee was 80% of budget; first year was reported as 59%; currently 47% (43% if you exclude benefits and utilities)	PARTIAL
Weights applied.	Campus based funding should reflect student characteristics; weights established via public forum and re-evaluated frequently.	PEER Committee recommended a committee be established to recommend weights; weights have been established and revised—process not strongly documented	PARTIAL
Campus based decision making.	Instructional, staffing and scheduling decisions should be made at the campus level; the principals are in the best position to know their students' needs.	Principal survey should inform us further. NOTE: Some curricular decisions are made at District level.	PARTIAL
Actual teacher salaries.	This means that each actual teacher's salary is used in budgeting and funding rather than applying the district average salary to every teacher. Average teacher salaries can unfairly penalize schools with less experienced teachers—which tend to be low-income—because it appears that their expenditures are larger than they really are. Inequities in real salary differences can yield coefficients of variation between .06 and .08 (Roza & Hill, 2004). Note: ESSA includes this requirement in their pilot program at the federal level as well.	The district currently absorbs the difference between actual and average salary. Grant funds budget on actual salary and benefits. Excess salary funds are used to off-set deficits on a district wide level. The net impact in these variances is zero, according to the RAH; according to the budget office, this is not exactly the case but the overage is viewed as minimal. PEER Committee recommended use of actual salary.	NO
School choice is the norm.	This is a public version of privatization in a sense; the money follows the student so each school is theoretically motivated to innovate/improve to capture more students/funding.	This is in place in Houston, but it is <u>not without constraints</u> . There are principal transfer agreements, etc. There are also constraints on specific populations that make them less likely to actively participate in choice.	PARTIAL
Minimize add-ons.	There should be no un-weighted add-ons, such as subsidies for small schools, magnet programs, etc. These programs tend to distort the equitable redistribution of funds that WSF is tasked with.	Small Schools subsidies and magnet subsidies both exist; magnet weight is a recent change.	NO

Element	Rationale	HISD Reality	Conclusion
Comprehensive school-based information system.	Principals need up to date financial information, purchases should be easy, and budget analyst support should be provided.	Principal survey should inform us further.	YES
Standard and benchmarks.	There must be expectations and accountability in place, both should reflect focus on ambitious student learning.	STAAR; HISD Board Policy Manual, Educational Philosophy, AE Local, 3/15/2013.	YES
Teachers involved in decision making.	Teachers have most direct knowledge about student needs.	Not part of this study. However, according to Board policy, 2/3 of the professional staff who serve on the campus level planning and decision-making committees must be teachers. BQB2REGULATION LDU 2017.01 and <i>Education Code 11.251(e)</i>	YES
Principal capacity.	Principals must be able to plan strategically and develop a budget based on their students' academic needs. Training/ professional development programs should be established to develop principal capacity where support is needed.	Principal survey should inform us further. School Business Manager Training Program supports school budget management. (Houston ISD Board Policy Manual, DM1 REGULATION) Training and Information Courses SAP 4.6	YES
Accountability via rewards/sanctions.	There is a need for monitoring and support. The PEER Committee recommended a formal review committee to monitor and report internal customer satisfaction.	District accreditation: <i>Texas Education Code 39.051</i> Performance indicators: <i>Texas Education Code 39.053(a), (a-1), (b), (c)</i> Principal Performance Incentives offered: <i>Texas Education Code 21.357(c)</i> AYP, TEA State Accountability 1993-2006: district rating system School Leader Appraisal Scorecard ASPIRE Awards (2005-2016) No formal committee established.	PARTIAL/External PARTIAL/Internal
Adequacy of funding.		Not part of this study; Picus et al. conducted 2012 adequacy analysis of Texas which indicates it is not adequate.	NO

Sources: Cooper et al., 2006; HISD Board Policy Manual Online; HISD RAH 2016-2017, 2014-2015; Ouchi, 2004, 2006; Odden and Busch, 1998.

Discussion

Fulfilled/commendable steps

The process that HISD originally undertook to decentralize was well documented and fairly well structured. Key changes were phased in, and attention was given to minimizing negative impacts as campuses adjusted to the new funding distribution. Over time, many of the key components of a strong decentralization model were definitely addressed. A significant portion of the budget was shifted to the campus level, although the proportion is not as high as theorists suggest; budget analysts and system supports were put in place. Student learning standards and associated accountability mechanisms provide oversight and support.

Unfulfilled/problematic components

There were key elements of decentralization that were not implemented: the shift from average to actual teacher salaries is one example. Using average teacher salary limits an important source of variation in funding, and experienced teachers are more often found in low poverty schools. The Small School Subsidies and magnet funding (note: magnet process did change recently) are two other examples. These add-on budget items serve to distort the impact of the weighted funding approach; they also serve to minimize the competition that is intended to drive innovation at the campus level.²

² The question of innovation and the actual potential for principals to be the change agent that reformers believe they can be will be addressed in a separate research brief, wherein principal surveys will help us understand whether the key players here believe they have the support they need to do this well.

Partially fulfilled components

Other components of decentralization have been only partially fulfilled. For instance, school choice is important because it fosters competition and innovation as campuses strive to protect their funding by doing the best job they can for students. HISD is an open choice school district in theory; yet in practice, most campuses are using transfer agreements and choice is somewhat constricted. Notably, choice as a mechanism also remains in question in the academic realm based on evidence that it tends to be more educated and involved parents who are active choice users. The adoption of weights has also been less structured than theorists suggest; it is important that weights are set appropriately. The PEER Committee did recommend establishing a committee that would revisit weights on a regular basis; weight adjustments have only occurred on an ad hoc informal basis.

Limitations

There are limitations to this study. First, the original move to decentralization occurred almost thirty years ago, and was implemented over a ten-year period, culminating in the adoption of WSF. A retrospective analysis is passive at best; however, HISD can learn from the consequences of this policy and apply the knowledge moving forward. Second, the theoretical arguments in support of decentralization rely on adequacy of funding, which is not the case according to the Picus et al. 2012 adequacy study of Texas. Finally, there are resources that are not captured that should be considered in a conversation about equity of both inputs and outcomes. These include but are not limited to peer effects, parent involvement, teacher quality, and curricular. If the ultimate goal is more equitable educational opportunities for all students, these variables must be factored into any dialogue about resource distribution.

Conclusion

Decentralization remains a viable approach to the equitable distribution and management of resources in school districts. It is a model that can appeal both to external reformers, due to the focus on school choice and a free market system, and internal reformers, who value local control. Of course, there are researchers who propose alternatives or modifications. Meyer (2009) notes that policy making should be centralized, while administration is decentralized. Examples of policy in this case might include curriculum planning and design and quality control standards. This distinction allows monitoring to occur more easily, because the end goal is centrally defined, but how it is achieved can be campus decision. Education Research Strategies (2014) also cautions that some resources might

be better managed centrally for compliance or safety reasons, such as school nurses, special education staff, or security officers. Other researchers believe that there must be a strong blend of decentralization and performance based incentives for students to benefit (Hanushek, n.d.).

To recap, the decentralization reform had two main objectives: the redistribution of funding and improving student achievement. This initial portion of the study demonstrates that decentralization was well implemented, but there are components that should be revisited to improve the intended outcomes of decentralization and WSF. The remaining briefs will investigate how well these goals have been met over time in spite of the implementation issues addressed here.

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